

# Basic Selling Skills

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# Preface

Are people born natural sales people or can the skills of selling be learned?

We firmly believe in that no matter what your background, education or experience is, that learning the art and the science of selling can be mastered with the right approach and technique.

During this textbook we'll cover what the best approaches are to sell more effectively. We'll assume that you have little or no selling experience so we'll take you by the hand and will give you a firm foundation in basic selling skills.



Sean McPheat, the Founder and Managing Director of management development specialists, MTD Training is the author of this publication. Sean has been featured on CNN, BBC, ITV, on numerous radio stations and has contributed to many newspapers. He's been featured in over 250 different publications as a thought leader within the sales and management development industry.

MTD has been working with a **wide variety of clients** (both large and small) in the UK and internationally for several years.

MTD specialise in providing:

- In-house, tailor made sales and management training courses (1–5 days duration)
- Open courses (Delivered throughout the UK at various locations)
- Sales & leadership development programmes (From 5 days to 2 years)
- Corporate and executive coaching

MTD provide a wide range of sales and management training courses and programmes that enable new and experienced staff to maximise their potential by gaining or refining their skills. Our team of highly skilled and experienced trainers and consultants have all had distinguished careers in sales and senior management roles and bring with them a wealth of practical experience to each course.



At MTD Training we will design and deliver a solution that suits your specific needs addressing the issues and requirements from your training brief that best fits your culture, learning style and ways of working. Our programmes are delivered when and where you need them! We believe that training should be fun, highly interactive and provide “real world” practical techniques and methods that you can use back in the office – and that’s exactly what we provide.

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# 1 Introduction

## 1.1 Overview of the Ebook

What do you think of when you think of someone with good sales skills? Do you think of someone who is a smooth talker, who schmoozes with their customers, and who is focused only on pushing their product? If so, you're not thinking of someone with good sales skills. Sure, they may occasionally be good at making the sale. But what about making the next sale? Or what about keeping the customer long-term?

How would you feel about becoming someone who helps people solve problems by offering them solutions that meet their needs? At its essence, this is what sales truly means.

We tend to have a picture in our minds of what being a salesperson involves – not all of it positive. Plus, some of us may think we would not make good sales people because we can't see ourselves cold-calling, prospecting, or being good at closing the sale. But in this ebook, we'll be looking at sales from a different point of view. How would you feel about becoming someone who helps people solve problems by offering them solutions that meet their needs? At its essence, this is what sales truly means.

Yet how do you get to the point that you can do this well? We'll be looking at several sets of skills and knowledge that will help you become a better sales person by helping you increase your understanding of what skills it takes to be a good sales person, what the basic sales process is, an overview of sales models, and how to maintain your relationships with customers once you have found them.

## 1.2 The Basic Sales Process

In Chapter 2, we'll examine the overall basic sales process. By breaking a sale down into the different stages involved, you can understand the steps of any sales relationship.

Everything related to sales processes is affected by our environment – the time we are living in, the level of technology available to us, and the general trends that are around us.

In this chapter, we're not looking at specific steps that you as the salesperson need to take, but rather the 'environment' in which you will be taking them. Everything related to sales processes is affected by our environment – the time we are living in, the level of technology available to us, and the general trends that are around us. We'll examine how sales tactics have changed over the years as well as the current trends that are common in sales today.



We'll look at a sale from the point of view we mentioned earlier – as a solution to a customer's problem. The process starts with a prospect, not a customer, and builds until you have not only solved the customer's problem that they originally presented, but you have established yourself as an expert source for the next time the customer has a problem.

### 1.3 General Skills Every Salesperson Should Have

In Chapter 3, we'll be looking at the general skills that anyone who wants to be a better salesperson should have. If you've ever met someone who just seems to be a 'natural' at sales, then they either have these skills as an inherent part of their personality, or they have studied or acquired these skills over time.

All of the skills you need to be a better salesperson can be learned and developed.

The important thing for you to know is that all of these skills can be learned and developed.

These general skills include:

- **Listening Skills** – an effective salesperson must be able to listen to what a potential customer or customer is saying to them – as well as what is not being said. They must be willing to take the time to understand what the customer truly needs and identify the problem the customer is trying to solve.
- **Effective Communication Skills** – in addition to listening, you must be able to respond well. You must be able to offer solutions to the customer's problems if the customer is ever going to buy from you or your company.
- **Problem Solving Skills** – good salespeople are always working to solve problems – they understand that problem solving is what their real job is.
- **Interpersonal Skills** – beyond communication skills, salespeople should know how to work well with their customers and with each other in order to be most effective. They should be courteous, respectful, and skilled at building relationships.
- **Organization Skills** – good salespeople are well-organized. This doesn't necessarily mean their desk is well organized, but it does mean that they have a system for maintaining information about prospects, customers, products, and any other information their customer might need.
- **Self-Motivation Skills** – if you're going to be good at sales, you have to be able to motivate yourself. There will be those times that you don't want to take the next step in the sales process, but you'll need to know how to work through those feelings and take the steps that your customers need – and that will help you be successful in your job.
- **Persuasion Skills** – customers almost always have a choice in the company they work with or choose to buy from. Persuasion is the art of helping the customer to choose your offer over others.
- **Customer Service Skills** – once you know how to make a sale, do you know how to keep that customer coming back? Do you view them as a one-time sale or as someone who could be a continual source of sales over the life of a relationship with them?

- **Integrity** – in any relationship, including a salesperson-customer relationship, integrity is vital. Without it, you will lose the customer's trust, their business, and possibly the business of others that the customer will tell about your company – and you.

## 1.4 Sales Models

Chapter 4 is when specific proactive selling skills will be identified. A proactive selling situation is one in which you pursue prospects and attempt to convert them into customers. The customer might have certain qualities that lead you to think that he or she may be interested in your service, and your job is to find out whether or not you are right. We'll examine sales models that you can use to actively pursue and sell to your customers.

In using any of these sales models, you must:

- Fully identify and understand the benefits of your products or services
- Identify potential customers (prospecting)
- Contact customers
- Establish rapport
- Identify a problem or need the customer has
- Explain how your product or service will meet that need
- Close the sale
- Follow through
- Maintain contact

When you have completed this cycle of steps the first time through, you have made a one-time customer by this sale. But it takes so much less energy to sell again to an existing customer than it does to find and sell to another customer. So, protecting your relationship with your existing customers and continuing to market to those customers will be a vital part of the skills that you need to develop. We'll address this more in the final chapter of the book.

## 1.5 Maintaining Customer Relationships

In Chapter 5 we'll focus on the fact already mentioned – that maintaining a customer is so much more effective (and often more lucrative) than attempting to locate a new customer. If you build some basic knowledge about your customer in their current and future needs, you'll be ready when a new or enhanced product or service rolls out that is right for your customers. And if you build steps into your routine, you can keep in touch with your customers and generate new sales or renewal commitments on existing sales with much more ease than generating that same level of sales with customers you haven't worked with before.

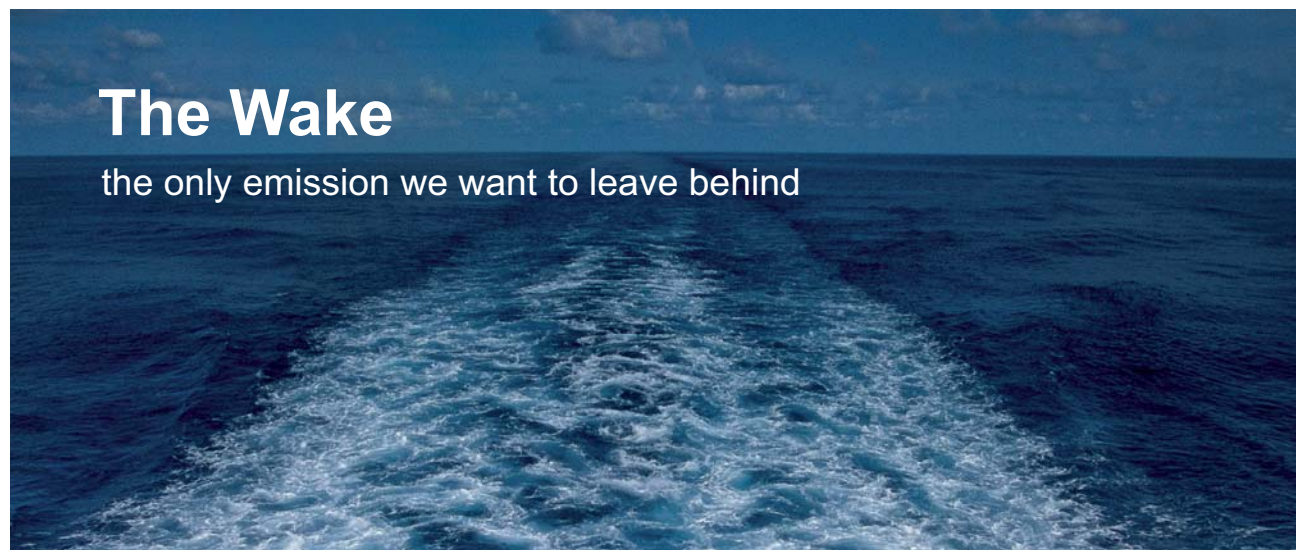
## 2 The Basic Sales Process

### 2.1 Introduction

As we begin to examine the basic sales process, the first step will be to examine the framework of the relationship between the customer and the salesperson. How do they interact? We'll look at how that relationship has changed and developed over time and some of what the influences for those changes have been.

The first step will be to examine the framework of the relationship between the customer and the salesperson. How do they interact?

Reviewing this information will help you to understand how important your actions are in determining when a customer will buy, and just as importantly, why one might not. Figure 1 demonstrates an overview of the basic sales process, though there are several ways of moving between the steps. We'll look at these ways of progressing through the steps, or sales models, in Chapter 4.




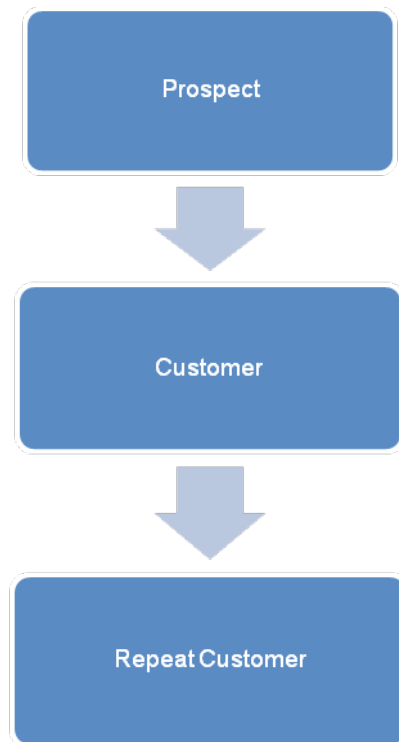
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**Figure 1:** Overview of the Basic Sales Process

## 2.2 The Changing Face of Sales

Like everything else about business, sales methods change on a regular basis. The way that we sell and reach customers will naturally reflect changes in our methods of communication and our technologies. The history of sales over the last several decades has changed dramatically, but the most dramatic changes have come since the advent of the internet and web-based advertising. Plus, the trend towards globalization means that we have to consider ways of communicating with others who may have very different needs than the customers we have worked with before.

Today, customers expect immediate, convenient, individualized service. If one organization doesn't provide it, chances are there is another choice to turn to.

Customers have changed as well. Today, we as customers expect immediate, convenient, individualized service. If one organization doesn't provide it, chances are we have another choice to turn to. So understanding customers is vital to overcoming the competition and learning what it will take to help your customer choose your product or service rather than the competition's.

In Figure 2 below, a comparison is made between traditional selling of the 1960s–1980s and modern selling. You'll see how the way we sell has been impacted by the changes in our modern environment and customer expectations.

Traditional Sales	Modern Sales
Popular in the 1960s–1980s, though still used today.	How we need to operate in sales today in order to be successful.
Standardized products	Customizable products and services
Seller knows the product	Seller knows the customer and his needs. In a business to business sales relationship, this means also understanding the customer's marketplace and what their customers, suppliers, and partners need.
Seller offers delivery service, supporting information, and training as part of the supply.	Seller helps customer to identify and interpret market opportunities and assists in decision-making as part of the supply.
Value of the seller's offering is judged by the sales price.	Value of the seller's offering is judged by sales price plus non-financial aspects related to Corporate Social Responsibility such as ethics and the environment.
Competitive strengths of the organization and product are based on tangibles only.	Competitive strengths of the organization and product now include intangibles that the organization must demonstrate to the customer.
Supplier only provides the product or service – very limited support available	Supplier now adds value beyond the product or service – the supplier works to enable the customer's business by providing education, assistance, expertise, and more.
Sales price is determined by the production cost plus a profit margin. Customers aren't given information on how price was determined.	Sales price is driven by the competitive marketplace (supply and demand). Customers may demand to see pricing elements.
Salesperson or supplier understands the customer's needs.	Salesperson or supplier understands – and may even inform the customer on – the needs of the customer's customers, suppliers, or other partners.
Salesperson is the only one who deals with the customer.	Customer may deal with anyone in the organization both before and after the sale.
Salesperson only 'sells' to external customers	Salesperson must 'sell' internally by advocating for the customer's needs to the rest of the organization
Organization's focus for salespeople is on acquiring new customers	Organization's focus for salespeople is on retaining and expanding current sales relationships (though new customers are also sought)
Buying and selling are the distinct function of specific individuals within each organization.	Buying and selling require a process involving people in each organization beyond the traditional 'buyer' and 'seller' roles.
Salesperson's authority to negotiate or be flexible in offers for the customer is minimal. Approval is required at multiple levels of authority to make exceptions for a customer.	Salesperson's authority for negotiation and flexibility is higher, though is usually dependent on the salesperson's experience. Exceptions are approved faster and without so many levels of authority required.
The customer knows the product and services that they need.	The seller or supplier must know the customer's business and be able to help them specify the type of product and services they need.
The buyer is an isolated function such that his or her understanding of the organization-wide strategy is limited and not discussed before a transaction is made.	The seller needs to help the buyer understand how the purchase will help support the organization's overall strategy in order for a transaction to take place.

Figure 2: Traditional vs. Modern Sales

## 2.3 The Development of the Selling Function

Now that we've looked at the main differences between traditional and modern sales, let's look more at some of the main changes that have occurred in the selling function over time. From the first bartering transaction to today's complex, contracted relationships, the way we interact with each other in sales transactions has changed – and will continue to change.

### 2.3.1 Sales from Simple Bartering to Profession

The beginning of sales was simple bartering and transactions. This basic form of selling happens when products are standard and commoditized. Price and reliability are most important to the customer. When transactions will occur is unpredictable and irregular. The relationship between the salesperson and the customer is limited to the single transaction between the two of them.

As sales became a recognized profession, relationship and a level of trust between the salesperson and the customer became more important. After all, if you were going to sell for a living, you'd need the reputation of someone with good products and someone who was trustworthy. This change included the popularization of sales training and sales as a profession was popularized by Dale Carnegie and others in the early to mid 1900s.

As people began focusing on sales as a profession, people began to study and identify what was important in a sales relationship. They identified some of these things that were important to both the buyer and the seller:

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- Continuity of the company or organization and the relationship
- Consistency in offerings and in service
- Sustainability of the product and/or service
- Understanding of the customer's real issues

To the customer, some important traits of the company they do business with were identified during this time as well. These included:

- Continuity in communications with their contacts
- Similar ways in which they want to trade with each other
- Mutual willingness to be flexible and adapt to each other

These benefits, when met, were enough for the customer to accept some kind of price premium, even when there were options available from competition. The benefits helped to build customer loyalty and customer relationships.

### 2.2.2 Management and Information

Before the 1960s and 1970s, sales training and methodologies didn't reflect the salesperson's incorporation of support in management and information. It might have happened incidentally and instinctively between a salesperson attempting to make a sale and the customer, but it was not uniform or part of the average salesperson's repertoire.

Starting in the second half of the 20<sup>th</sup> century, the salesperson began working to add value to the customer. The selling organization could add other forms of support to the buyer, which would in turn lead to further improvements for the customer and additional purchases from the buyer. Figure 3 demonstrates how this added value influences the salesperson / customer relationship.





**Figure 3:** Impact of Value Added Sales Relationships

### 2.3.3 Partnership

A natural progression of sales techniques was to move even more towards a 'partnership' with customers. This level of intricacy in the arrangement between customers and salespersons mainly began in the 1980s with the rise of 'outsourcing.' In these arrangements:

- The buyer's and seller's relationships become smooth and regular
- The seller, or supplier, is treated as a part of the customer's organization
- Especially in out-sourcing, once created, the relationship is difficult to dissolve
- May not be a legal partnership, but the relationship behaves as if it were one
- Time is required to develop this kind of partnership selling (often, years)
- Usually a great deal of cooperation that is not written or contracted but develops as part of the relationship, reinforcing the partnership

Think about this for a moment. If I need to outsource my customer service function to another organization, I am entrusting a huge portion of my company's operations – an important part – to a supplier or partner. I pay them for the service, and they perform it in return.

Now it's two years later. I've eliminated the majority of my own customer service staff, at least the front-line employees. Then the company that has been performing the function is no longer meeting my expectations, or they get too expensive, or we simply find another organization that we feel can do the same job for less money.

Imagine the level of work it would take to un-couple the relationship my organization has with the outsourcing organization. All of the retraining, the organizing, the technical aspects of transferring phone numbers, updating procedure manuals, and making any other changes that are necessary when shifting to another supplier.

The intricacy of this kind of seller and buyer relationship is such that I'm going to want to do everything I can to get it 'right' the first time. This means the 'sale' will take longer than most other types of transactions where there is a single item being sold and purchased. There will be weeks, months, or even years of fact-finding, presenting, negotiating, and comparing offers before a seller (or supplier) is chosen.

In outsourcing relationships, the supplier becomes almost a part of the customer's organization. The intricacy of this relationship will require a longer sales process than those involving a single product or service.

An advertisement for SKF. It features a woman with long dark hair smiling in the foreground. In the background, a large white wind turbine is visible against a blue sky. The text 'Brain power' is written in large white letters on the left. On the right, there is a block of text about wind energy and SKF's role. At the bottom left, there is a call to action to visit the SKF website. The SKF logo is in the bottom right corner.

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As a salesperson, your sales process in partnership sales will therefore be long and involved, but the rewards for a successful sale will be greater as well. You will be working with fewer clients than in other sales positions, but will be expected to be 'more' to those clients than just a seller. You'll be an ongoing part of their business for as long as the relationship lasts.

### 2.3.4 Education and Enablement

From approximately the year 2,000 forward, the partnership type of sales relationship has been evolving and becoming even more in-depth and intricate. While partnership selling requires significant involvement, the education and enablement type of selling goes even further in creating the buyer's dependence on the seller as a source of information and assistance. Due to the fact that it is relatively new, not all aspects of this type of relationship are fully understood. But some of the characteristics of this type of relationship include:

- Educational activities of the seller and the seller's organization exceed those of the partnership relationship
- The seller is a facilitator, enabling the buyer to perform at a higher level through the implementation of the seller's products, services, and assistance.
- The seller educates the buyer on the buyer's business in order to help improve their understanding, development, and processes when interacting with their own customers
- Very sophisticated type of selling where the salesperson and the salesperson's organization fulfill the roles of guide and mentor for the buying organization
- Seller's involvement can actually foster significant changes in the buyer's organization through the relationship

The education and enablement type of selling goes even further in creating the buyer's dependence on the seller as a source of information and assistance.

As more is learned about this style of sales, more information will be available about how to perform this type of sales transaction. However, one thing is becoming clear to those who observe trends in sales methodologies. The most successful sales organizations in this time will be the ones that are most capable at enabling their customers' success, development, and competitive positioning in the marketplace.

# 3 General Skills Every Salesperson Should Have

## 3.1 Introduction

Now that we have examined the development of sales methods and interactions over time, we will look at what it takes to be successful in sales today. As customers grow to expect more from their customers, you must be willing and able to respond to and fulfill those expectations in order to move ahead.

The good thing about these skills is that they can all be learned. As you read through this information, try to identify where your own weaknesses might be. Then you'll have an idea of what you need to work on in order to improve your own sales skills.

As you read this information, try to identify where your own weaknesses might be.

## 3.2 Listening Skills

As we've learned, a successful sales relationship today involves the seller being able to help the buyer identify his or his organization's true needs. The seller helps this process by being able to listen to and understand what the buyer is telling him.

Studies have shown that most listeners retain less than 50% of what they hear.

Good listeners are rare these days. Studies have shown that most listeners retain less than 50% of what they hear. Imagine what that means when it comes to a conversation that you might have with your boss, a colleague, or a customer. If you speak for ten minutes, chances are that you have only heard about half of that conversation – and so have they. No wonder miscommunications happen so frequently!

In order to be a good listener, you should practice active listening skills. There are five key aspects of becoming an active listener. You are probably already employing some of them, but may need to practice others. However, once you are using these tools over time, you will find that they get easier and easier. Plus, you'll learn so much about your customers and have such better conversations that you will be positively reinforced each time you practice.

**1. Pay close attention.**

With this step, you learn to give the speaker your undivided attention. But you also let the speaker know that you are listening by using acknowledgements – types of verbal and non-verbal tools that help add proof that you are truly listening.

- Look the speaker in the eyes
- Stop any mental chatter
- Don't start preparing your response or rebuttal while the other person is talking
- Make sure your environment doesn't distract you
- Notice the speaker's body language and tone of voice – what are the non-verbal messages telling you?
- If you are in a group, avoid side conversations

**2. Demonstrate physically that you are listening.**

Use non-verbal and verbal signals that you are listening to the speaker attentively.

- Nod from time to time, when appropriate
- Use appropriate facial expressions
- Monitor your own body language. Be sure you remain open and relaxed rather than closed and tense
- Use small comments like 'uh-huh', 'yes', 'right'.



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### 3. Check for understanding.

It is possible for the other person's message to get mistranslated or misinterpreted, so that we hear a message that was not intended. Before responding, it's important to check for understanding using these tools.

- Use reflecting and paraphrasing. Check that you heard the message correctly by saying things like "what I hear you saying is...." or "If I'm hearing you correctly, you're saying...." or "I think you're talking about....".
- Ask questions that will help clarify the speaker's meaning. Suggestions include things like, "Can you tell me more about...?" or "What did you mean when you said...?" or "I think you're saying...is that right?"
- Summarize what you've heard occasionally – don't wait until the end or you might not remember exactly what was said.

### 4. Don't interrupt!

There is nothing good that comes from interrupting the speaker. You will only be limiting your chance of understanding the message because you won't hear it all – and because the speaker will get frustrated!

### 5. Respond Appropriately.

When you are actively listening, you are showing your respect for the speaker, as well as gaining the information that you need to form your response. Once you have that information and have clarified it, it's time to form your reply. When expressing your thoughts:

- Be honest and open
- Be respectful
- Be thorough

## 3.3 Effective Communication Skills

Effective Communication Skills – in addition to listening, you must be able to respond well, whether in person, over the phone, or in writing. You must be able to offer solutions to the customer's problems if the customer is ever going to buy from you or your company.

Communication skills are the tools that we use to remove the barriers to effective communication.

Imagine you are on one side of a wall and the person you want to communicate with is on the other side of the wall. But there's more than the wall in the way. The wall is surrounded by barriers. These barriers could be things like different cultures, different expectations, different experiences, different perspectives, or different communication styles, to name just a few.

You might experience only one of these barriers at a time, or you might find yourself facing them all. Getting your message to the other person requires that you recognize these barriers exist between you, and that you then apply the proper tools, or communication skills, to remove those barriers preventing your message from getting through.

Of course, communication is a two-way street. The person on the other side of those barriers will also try to send messages back to you. Your ability to understand them clearly could be left to a dependence on their ability to use communication skills. But that's leaving the success of the communication to chance. Instead, you can also use your own communication skills to ensure that you receive messages clearly as well.

We instinctively recognize what body language and other non-verbal forms of communication are telling us.

Finally, there isn't only one point in your communication with another person at which you have to watch out for barriers. To be successful at communicating, it's important to recognize that these barriers to communication can occur at multiple points in the communication process.

Remember that communication skills involve both verbal and non-verbal communication. When communicating with others, the non-verbal aspects of what we are saying are actually more important than the words that we use. In fact, if the two conflict, we will automatically believe the non-verbal communication we are receiving over the verbal.

So what do we mean by non-verbal communication? Mainly, we are referring to tone of voice and body language. Tone of voice is responsible for about 35–40 percent of the message we are sending. It involves the volume, emotion, and emphasis in our voice when we speak.

Over half of the message we are sending can be due to body language. Body language is a subconscious way that we communicate, but it is one that we recognize in others on instinct. Examples of body language include:

- Facial expressions
- The way they are standing or sitting
- Any swaying or other movement
- Gestures with their arms or hands
- Eye contact (or lack thereof)
- Breathing rate
- Swallowing or coughing
- Blushing
- Fidgeting



Basically, body language includes anything they are doing with their body besides speaking. We recognize this communication instinctively, without having to be told what it means. It is important that when you speak to a customer, your body language supports rather than contrasts what you are saying.

### 3.4 Problem Solving Skills

The salesperson of today is a problem-solver who works in conjunction with the customer to identify any issues that the customer has and then uses that information to offer solutions to the customer's problems or situations. The tricky part of this situation is ensuring that the problem that the customer is attempting to solve is the actual problem that exists.

For example, a customer might come to you saying that they need a specific type of software. You could just sell the customer the software and that would be the end of it. Or instead, you could ask the customer questions in order to determine what the problem is that they are trying to solve. You may then be able to:

- Offer a better product or solution than the specific one the customer asked for
- Offer a broader solution that the customer didn't even know they needed or wanted
- Offer additional products or services that enhance your sale and also exceed the customer's expectations
- Identify additional needs that the customer has which you can then offer to resolve with other products or services
- Determine that you don't actually have a product or service that will solve the customer's problem



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The first step in problem-solving is to ensure that the problem the customer is trying to solve is the actual problem that needs solving.

The final point above may not seem like a solution you would want to offer. But the fact is that telling the customer the truth will establish you as a reliable, trustworthy source of information for the next time they need something.

One simple problem-solving tool is to use something called ‘The Five Whys.’ It is simple because it uses the question ‘why’ up to five times in order to help get to the root of a problem. But remember that it is indeed a simple tool – if you are dealing with a more complex problem, you may need to learn other problem-solving skills. An example of how to use this tool is shown in Figure 4 below. Notice that in this case, it’s not necessary to use five ‘why’ questions to get to the root of the problem.

Customer	Salesperson
I need a copy of your ABC billing software.	Might I ask why?
We are having problems keeping track of customer bills.	Why are you having trouble?
We do it by hand, but now our customer base has grown so much that we can’t keep up. Correspondence in general is difficult.	Why is correspondence difficult?
Because we have about 10 different pieces of information that have to go out to different customers in addition to the bills. Keeping all that in order is quite a challenge.	It sounds to me like you need more than a billing system – it sounds like a customer contact management system is what you really need. Why don’t I show you some of the benefits it could provide?

**Figure 4:** Using the Five Whys Tool

### 3.5 Interpersonal Skills

Interpersonal skills are more than just communication skills. They are the ‘people skills’ that seem to come to some of us so naturally, while other of us may struggle with them. Interpersonal skills will help you to work with your customers and build rapport with them, but it will also help you to advocate for your customer with your colleagues across your organization. Interpersonal skills also help you to build the type of long-term relationships that are important in maintaining customers over time.

Interpersonal skills are the ‘people skills’ that help you to work with and build rapport with customers, as well as to advocate for your customer within your own organization.

Some interpersonal skills include:

- Courtesy – it’s been said that good manners cost nothing, and that’s the truth. There is no reason to be anything but courteous when dealing with your customers and colleagues. It fosters relationships and shows that you care about making the other person comfortable.

- Respect for others – you’ve heard the ‘golden rule’, that you should treat others the way that you would like to be treated. But the true expression of respect is something called the ‘platinum rule’ – treating others the way that they would like for you to treat them.
- Ability to see things from others’ perspectives – if you have a customer who is upset about something, you might feel as if they have overreacted at first. But you need to be able to understand how what has happened is affecting your customer.
- Perhaps to you, having the order arrive one day late is not a big deal. But to your customer, it could mean lost sales, lost productivity, embarrassment for him in dealing with his own customers, or any number of things. Your job is to understand – and express that understanding – so that the customer feels heard and acknowledged.
- Ability to understand various communication styles – each of us has a way of communicating with the world, and your customer’s could be very different from your own. These differences could create barriers to relationship building if you don’t understand how they may show up.
- For example, a person who you perceive as being rude or cold may simply be reserved or shy. Or a person you see as intrusive or forward may simply be interested in people in general and is not meaning any disrespect. This is just one form of keeping an open mind when working with others – a huge factor in interpersonal skills!

### 3.6 Organization Skills

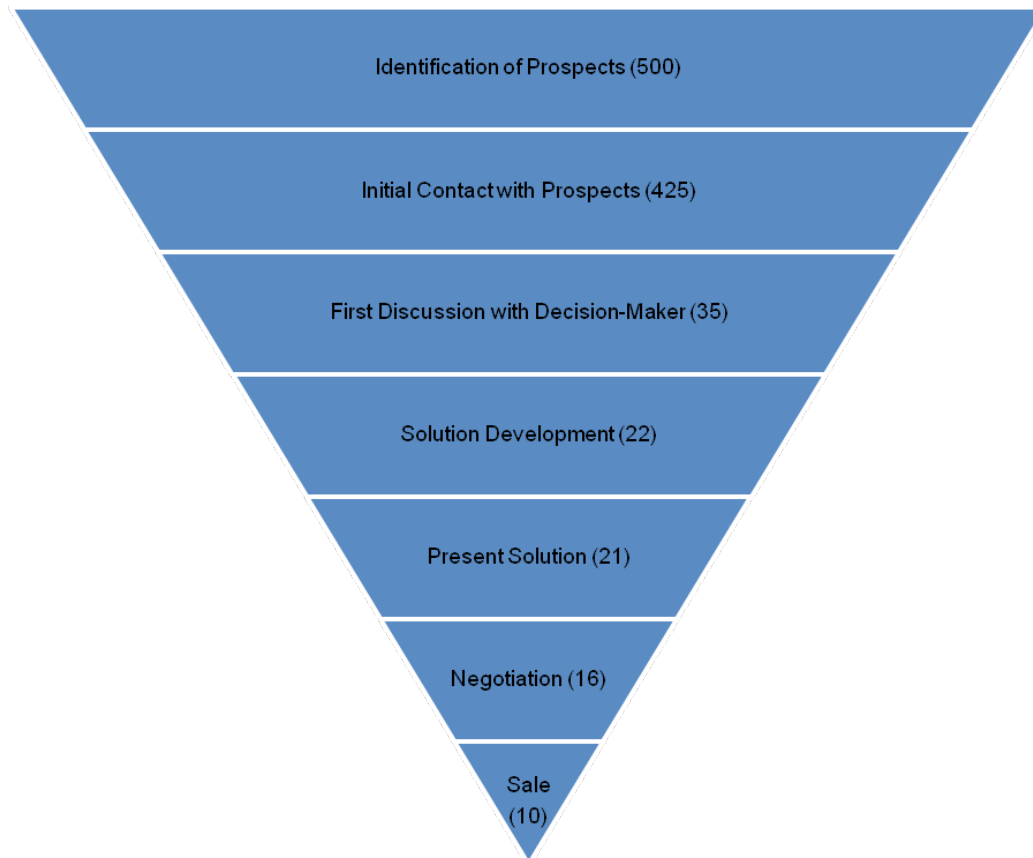
If you are going to be a success as a salesperson, you have to be well-organized. You’ll have information on your own products and services to keep track of, information on your customers and their businesses, information on prospects that might become customers, and any other information that your organization might provide.

Plus, you’ll have information relevant to the job itself. You’ll have to keep track of any sales you make if you are paid by commission or quota. You will have information on internal promotions and procedures, as well as information on how to use any data, tools, or software that you need to use. You’ll also have a calendar to keep track of involving any meetings with clients or internal support people.

So what can you do to help improve your organization skills? Here are some suggestions:

- Keep one calendar that has both business and personal appointments on it. Whether electronic or written, include the location of the meeting as well as the contact information for the person you are meeting with.
- Create a sales ‘funnel’ to track which stage of a sale your customers are in. An example of a sales funnel is shown in Figure 5. The numbers in parentheses represent the number of customers in each stage of the funnel. You would create a spreadsheet or file for each of the customers at each stage in order to track when you move them from stage to stage through the funnel.

The funnel should represent a specific period of time such as a month or quarter, at the end of which you can evaluate how well you are doing at moving customers towards a sale.



**Figure 5:** The Sales Funnel

- Get in the habit of creating a ‘to-do’ list at the end of your workday of things that you need to get done the next day. Label them in order of priority in case you aren’t able to complete them all. If something doesn’t get completed, move it to the next day’s to-do list.
- Use a contact management system software system, if possible, which will help you keep track of when you have spoken to, sent mail to, or sent email to a customer, as well as when you need to contact them again.

If you can’t get a content management system, create one of your own using Microsoft Access or Excel. You should be able to sort by different values that are important in determining how and when you contact each customer (size of organization, type of industry, current products the customer has, date(s) you promised to follow-up with customers, etc.).

### 3.7 Self-Motivation Skills

As a salesperson, you have to be able to motivate yourself. There will be those times that you don’t want to take the next step in the sales process, or to make that phone call to the next customer. But you’ll need to know how to work through those feelings and take the steps that your customers need – and that will help you be successful in your job.

Motivation requires a goal to strive for. You can get as creative as you want in the goals that you set for yourself, as long as they will help you to take the next action(s) that are necessary in moving through the sales funnel. The goals don't have to be related to your sales funnel – they could also be related to your own personal growth.

Here are some tips for how to keep yourself motivated:

- As we said, motivation requires goals. Decide on what your goals are – and write them down. Consider short, medium, and long-term goals.
- Do it anyway. We all have days where we just don't feel like doing our work. But in a job like sales, every day and every contact can be important. So even if you don't feel like doing something on your list – do it anyway. The more practice you get at this, the easier it will become.
- Stop procrastinating. It's very easy to find things to do other than what is on your list. You need to recognize when you are procrastinating and nip it in the bud. The sooner you get whatever it is you are procrastinating over finished, the sooner you will be free of it and ready to move on to the next thing on your list.
- Set rewards for yourself. As you complete your goals, be sure to celebrate your successes with rewards for yourself. This positive reinforcement will then motivate you to work towards the next goal – and the next corresponding reward.

There will be times that you don't want to take the next step in the sales process. Self-motivation will help you work thorough those times.

### 3.8 Persuasion Skills

In today's competitive marketplaces, customers have a choice in where they will take their business. Persuasion skills are the tools that you can use to encourage the customer to choose your product or service over the competition.

The most important skill in persuasion is understanding the point of view of your customers and providing information on the benefits of your offer. As salespeople, we tend to focus on the features of our offering, when what we truly need is to focus on how the customer will benefit from our product or service. Let's imagine that we sell alarm clocks – a simple example, certainly, but it will help you to see the difference between features and benefits in Figure 6 below.

Features	Benefits
Dual Alarms	Lets you set a back-up to be sure that you don't oversleep, or lets you set different alarm times for different people.
Large, Illuminated LED Numbers	Makes it easy to see the time without turning on any lights. Easy to see even if you are sleeping without glasses or contacts.
AM/FM Radio	Allows you to enjoy music at any time, or to set your alarm to activate on the music station of your choice.
MP3 Player Jack	Turns your alarm clock into speakers for your MP3 player for use at any time of day. You can also program the clock so that you wake up to your favorite songs on your MP3 player.
Durable Plastic Casing	This clock can withstand those early morning slaps to turn the clock off.
One Year Manufacturer's Warranty	Protects your investment. With any malfunction of the clock, you can get a replacement in the first year.

The most important skill in persuasion is understanding the point of view of your customers and providing information on the benefits of your offer.

**Figure 6:** Comparison of Features and Benefits

For more complex offerings, you'll need to consider what the benefits of your product are, and focus on them in order to help persuade the customer.

Here are some more tips on how to persuade your customers:

### 1. Demonstrate Your Understanding

Putting yourself in your customer's shoes lets you look at the scenarios they are facing and helps you to concentrate on finding the best solution for their scenarios. When you work with your customer, the interaction is not about you – it's about them. Ask questions that demonstrate you are well-informed about their business their needs, and how your organization can help them to be more successful in their own business.

### 2. Generate a Friendly, Responsive Environment

Don't underestimate the impact of being friendly and responsive. Your attitude in working with the customer, meeting their needs, and handling their requests says a great deal about you and your organization to the customer. Plus, your responsiveness – how quickly you respond and how well you meet their expectations – will be an important decision point for any customer. One good rule of thumb is to under-promise and over-deliver for your customers. You'll be demonstrating an exceptional level of customer service that they will want to experience again in the future.

### 3. Provide Evidence and More Evidence

You need to be able to demonstrate to your customer that you, your organization, and your product or service are the best choice for the customer. Be able to explain precisely how your offering will benefit the customer in ways that the competition cannot. Give the customer testimonials from other customers and show them before and after scenarios that prove how your product or service has made a difference for other customers and how it can do the same for them. No matter what you do, be sure that anything you share is fully verifiable.

### 4. Demonstrate Your Expertise

Who would you be more apt to buy from – someone who knows the basics about your industry or someone who you see as an expert in your field? As you work with the customer, demonstrate that you understand what you are presenting to them. Share information that shows you understand their field, the upcoming trends, and the challenges people in that industry are facing. You'll instill confidence in the customer to choose your product or service over the next provider.

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### 3.9 Customer Service Skills

Customer service is not just a series of steps that you complete. It is an attitude and a way of looking at customers that enables you to provide the best level of service that you and your organization are capable of providing. Don't underestimate the power of customer service when it comes to making sales and keeping customers – many customers are willing to pay a higher price or go without certain features if they know that they have access to excellent customer service people who will be responsive and effective whenever they are needed.

Customer service is an attitude and a way of looking at customers that enables you to provide the best level of service that you and your organization are capable of providing.

So what does it take to provide excellent customer service skills? The answer to that question could fill books of its own, but here are a few tips on some main points:

- Take responsibility for the customer's experience – from first contact and beyond the sale. Customers might only make one purchase from you – or they might make repeat purchases over time. But even if they don't ever buy from you, they can carry an impression of your customer service with them and tell others about you – the good and the bad.
- Remember that even if you have dealt with this same issue a hundred times already today, it is the first time that your customer is dealing with it. Put yourself in their shoes and try to understand how their problem is impacting them and their business.
- Communicate, communicate, communicate. Whether you have good news or bad news or just some interesting news, you need to remain in communication with your customers. Many times a customer will be understanding about a situation as long as you keep them informed about what is going on.
- Honor your word. When you make a promise, be sure that you can deliver on it – and hopefully, exceed what you've promised. Your word is very fragile with customers – it takes only one time of failing to deliver on your word for you to destroy the reputation that you've built with the customer.

### 3.10 Integrity

As in any relationship, integrity is vital in your relationships with your customers. What do we mean by integrity? A simple definition is that someone with integrity acts in accordance with their values and their commitments. This means that if you act with integrity, you will be fulfilling not only your organization's values, but your own.

When you demonstrate that you have integrity, you show that you are someone who can be trusted and that you have the best intentions for your customers. This can make you a valuable partner and a trusted colleague. It can take multiple interactions to show that you have integrity – but, as mentioned above, you can damage your integrity with only one failed interaction. Remember that every time you work with your customer, you have an opportunity to demonstrate your integrity.

A simple definition of integrity is acting in accordance with your values and your commitments.



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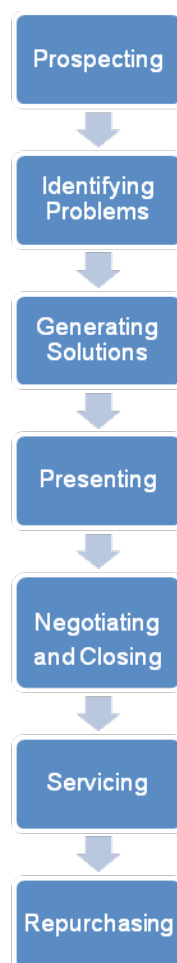
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# 4 Basic Sales Models

## 4.1 Introduction

There are a number of different models that can be followed in order to turn a prospect into a customer. They all require a certain level of understanding on the part of the salesperson regarding what the customer needs, which then requires a solution be presented that should meet those needs. How you move through these steps varies depending on what kind of product or service you are offering and the level of complexity that the appropriate sales process requires. However, Figure 7 shows the general sequence of steps that sales processes follow. The final step, repurchasing, will not necessarily happen with every customer, but in many organizations the product or service you offer is one that can be repurchased, providing you have met or exceeded customer expectations to this point.



**Figure 7:** The General Sales Process

Now let's take a look at a couple of more descriptive sales models that you can adopt according to your product or service, your organization, and the needs of your customers.

## 4.2 AIDA

This model is an oldie but a goodie. This sales method has been used in sales training since the 1950s, when professional sales training programs became the norm. It was developed over time and thought to be based on earlier psychological studies by Walter Dill Scott in 1913, but no official, specific source for AIDA is agreed upon. The acronym stands for:

- A – Attention
- I – Interest
- D – Desire
- A – Action

AIDA (Attention, Interest, Desire, Action) is one of the earliest sales models used in professional sales training, but is still valid today.

The model refers to the process that is required for a person to act on external stimuli – not just sales opportunities, though it is a perfectly valid model for sales. Anytime we make a sale, we must first gain the attention of our customer, and then generate some interest on their part to learn more about the product. Next, they must want the product – they must see the value in the product for their organization – before they will perform the action of buying. The applications for AIDA are broad enough that whether you are in advertising, marketing, or sales, AIDA is one tool you should remember. Let's look further at each individual step.

### 4.2.1 Attention

Getting the attention of your customer is the first step, and is important because it sets the tone for your relationship going forward. As the saying goes, you only get a single chance to make a first impression, so be sure that you are representing yourself, your product or service, and your organization in the best possible light. Some additional things to remember about Attention are:

- Smile – even if you are having your first interaction over the phone. Behave in a natural, pleasant, and professional manner. People form their first impression of others in the first five seconds of meeting each other.
- Getting the attention of your prospects is even more difficult than it used to be. People have less time, more distractions, and are generally less accessible. This means that you need to plan an appropriate amount of time to get past the 'gatekeepers' that will be between you and your prospects. Be sure that you have thought about what the best time to reach your customers will be. Different industries or fields may have different work demands that will impact when you should attempt to reach them.
- All of us are inundated with attempts to get our attention every day. And in most cases, we're used to the gimmicks or tricks that companies try to use to get our attention – and are often irritated by them. A unique approach with a focus on benefits for your prospect is the best way to get a customer's attention.

- Don't allow your failed attempts at getting attention to discourage you. You can expect to hear 'no' more often than 'yes.' Just remember that every 'no' is bringing you one step closer to the next 'yes.'

Advanced communication is a true art form, requiring practice, finesse, and a skill set that goes beyond those that the average person possesses.

#### 4.2.2 Interest

Once you've gotten the prospect's attention, you can't hold it unless you generate some interest. You usually have about 15 seconds to create that interest in your customer. Something will appear interesting to your customer if:

- It is relevant to the prospect and can provide some kind of advantage (benefit) for them.
- You are approaching the person who has a need for your product or service.
- You are approaching the prospect at the right time – both in the sense of convenience and in the sense of the correct time of year / correct timing for your prospect to use your product or service.
- You can talk the language of the prospect. You should be able to empathize with and understand the prospect's situation, then express that understanding in a way that shows you have that understanding of their situation.

You usually have about 15 seconds to capture your customer's interest

#### 4.2.3 Desire

Once you have the prospect's interest, you need to be able to grow that interest into desire for your product or service. This requires further development of your rapport and conversations with the prospect. This is when you can learn more about what the prospect's needs are and how you can help them, plus it's the chance for you to show that you are the right choice for the product or service they need. In this phase, you should:

- With the prospect, identify and agree upon the prospects:
  - Situation
  - Needs
  - Priorities
  - Constraints

To find this information, use a series of questions, being sure to rephrase what you think you have learned so that you can check for understanding.

- Build a level of rapport and trust such that the prospect feels comfortable doing business with you and your organization. Take every opportunity to help dismiss any of the prospect's feelings that doing business with you personally could be a risk. Demonstrate your integrity, your knowledge, and your abilities.
- Understand what the prospect's other options are for the product or service you are offering. What will your competition be offering? How can you distinguish yourself from the competition? What will the competition say about you and how can you respond to it?

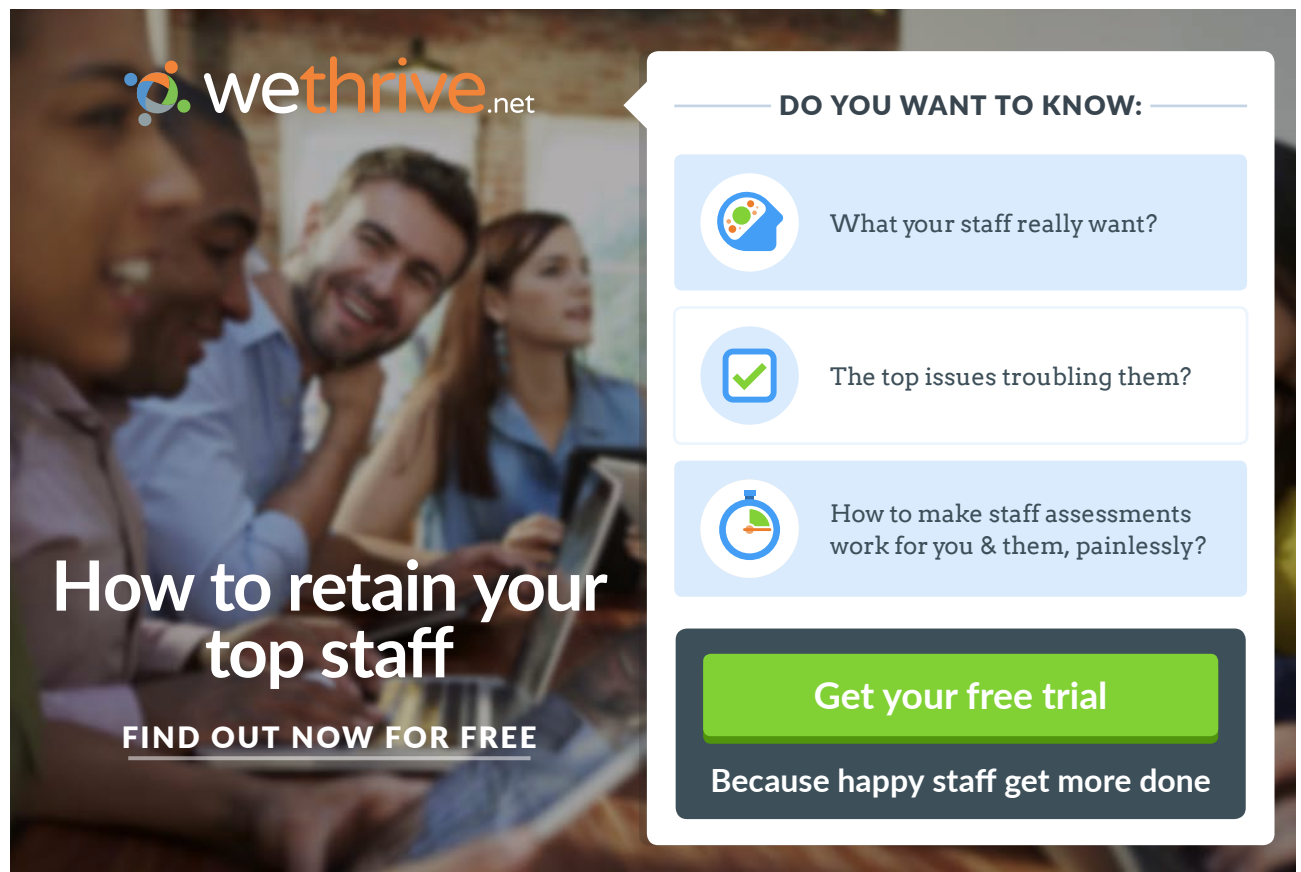
- Be sure that you understand your own product or service inside and out. You want to be able to answer any questions that the prospect has, identify any particular advantages of your product over others, and be able to identify every way in which those advantages can help the prospect.
- You must be able to identify solutions from your selection of products and services, compile a proposal for your prospect, and explain in clear, exact detail how your solution will work, what the results will be, and any areas that might exceed the customer's expectations.
- Demonstrate that you have taken any constraints into account in your presentation for the prospect.

Taking the customer from interest to desire requires that you learn more about what the prospect's needs are and how you can help them.

#### 4.2.4 Action

If you have completed the first three stages thoroughly and well, this final stage of action should flow forward easily. The customer will have a strong desire for your product or service and will believe that you are the right choice to be their provider. It now only remains for you to get the customer to take the next step; the action which will commit the customer to your services.

- Caution, hesitancy, or the simple fact that there is so much more to do these days for all of us may mean that it takes some follow-up efforts in order for you to get the final commitment.



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- If there is some hesitancy, there may be some objections that you haven't addressed yet, or some concerns that need to be discussed. Use your questioning skills to discover what information your customer may still need in order to commit.
- Make sure that you follow-up on any action that you need to take as soon as possible. You don't want to let the customer think that their business wasn't important enough to follow-up on right away.
- Also be certain that your customer is satisfied with any installation, delivery, transfer, or other process involved in implementing your product. Remember, customer service shouldn't end with the sale.

If the first three stages have been done thoroughly and well, this final step will flow easily.

### 4.3 AIDCA

AIDA has been around for over half a century. But a more recent flavor of the sales model has enhanced AIDA slightly. Since the 1980s, some sales training has added a C, or Commitment phase to AIDA – after the Desire phase and before the Action phase. So the new acronym stands for:

- A – Attention
- I – Interest
- D – Desire
- C – Commitment
- A – Action

In the AIDA model, commitment is considered to be part of the Action stage. But there is no reason you cannot consider Commitment as a separate stage. Commitment in this sense is a way of securing that your prospect will move to the Action stage. Once you have given your presentation for a solution, you gain commitment to your solution before moving on to take the necessary action to implement the solution.

One thing to realize about AIDCA is that this sales model is only applicable when you are selling in a format that involves two-way communication. For example, on-line sales opportunities can follow the AIDA model, but you wouldn't need the Commitment stage because there is no means for the prospect to commit before purchasing – the purchase is the commitment in those cases. AIDCA is more appropriate for face-to-face or phone presentations where you have an ongoing dialogue with the customer.

### 4.4 The Seven Steps of the Sale

Another common, traditional sales model is The Seven Steps of the Sale. The steps have been customized by different sales trainers at different times, and may involve anywhere from five to eight steps depending on what sales training manual you are studying. However, the seven steps identify what should happen before a sale, the process of getting the sale, and then what happens after the sale has been completed.

The seven steps model has been customized by different sales trainers and may have anywhere from five to eight steps.



As you look at the model, realize that it is based on the assumption that you have succeeded in securing a sales call or, if by phone, that you have gotten in touch with and gained the interest of the decision-maker. You can adapt the model to assist you in whatever stage of the process you are currently in.

Also understand that this model, while certainly valid, is also over forty years old. In today's sales environment, you will need to apply some collaboration and facilitation skills in order to land a sale. This means that you will be collaborating and working with your organization internally as well as with the customer's organization externally in order to facilitate the customer's success in their own business environment. The more you can facilitate the customer's success, the more successful you will become in return.

In today's sales environment, you will need to apply some collaboration and facilitation skills in order to land a sale.

The Seven Steps of the Sale were originally listed as they are shown below. However, over time, the steps have been expanded and broadened. Each of these steps will be discussed in the sections that follow:

1. Preparation
2. Introduction
3. Questioning
4. Presentation
5. Overcoming Objections
6. Close
7. Follow-up

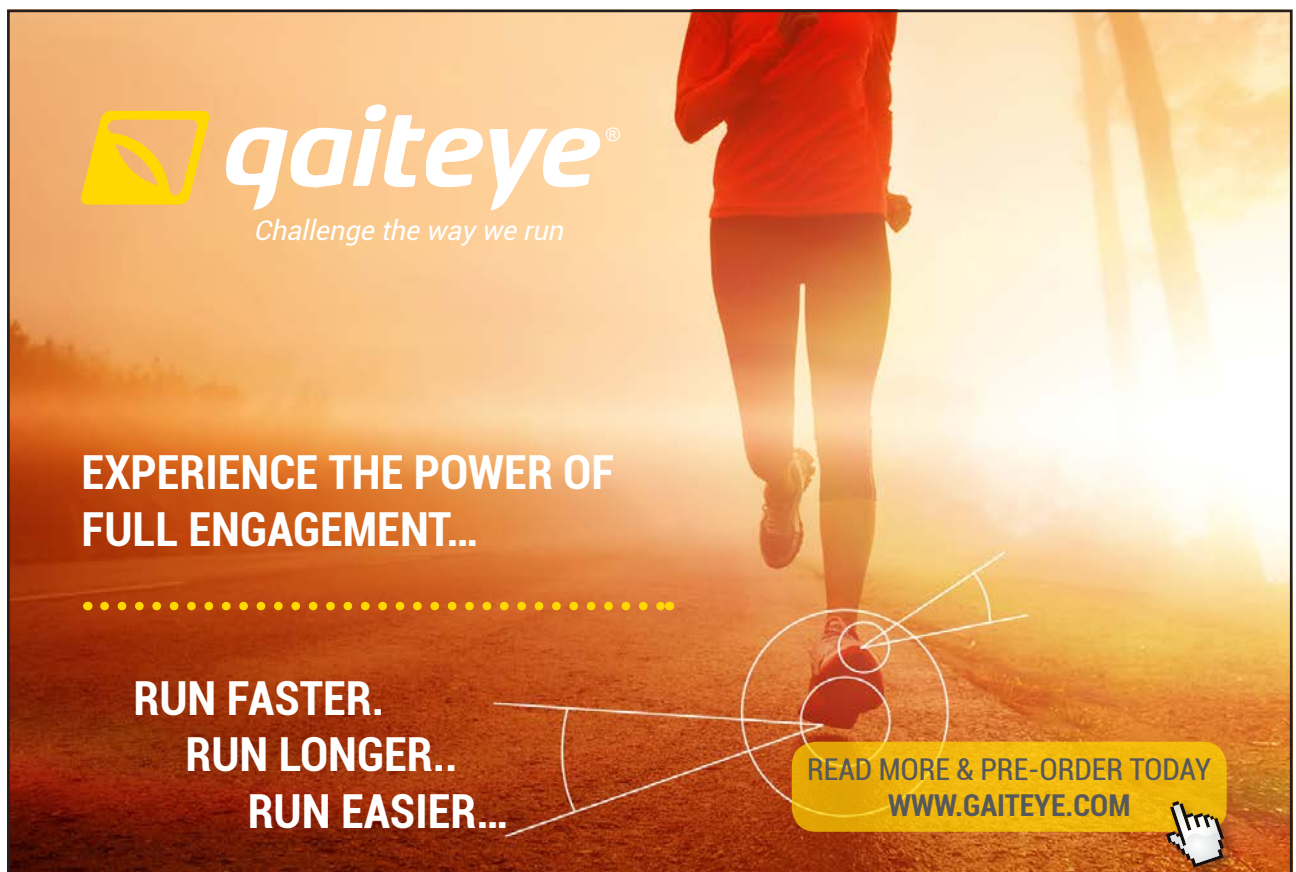
Let's look at each step in detail.

#### 4.4.1 Step One – Preparation

Preparation involves research, planning, and deciding how to approach the customer. In general, the larger the corporation that you are considering as a prospect, the more work you will need to do before approaching the customer. This step involves:

- Learning about the organization, including its:
  - Position in the marketplace
  - Main competition
  - Strategic issues
  - Aims and goals
  - Priorities
  - Problems or challenges
  - Decision-making structure

- Discovering, if possible, what the organization's current arrangements are for the type of service or product that you will be offering, as well as what the current provider may be able to offer in order to keep the customer's business. Also consider other competition and what their strengths and weaknesses would be in presenting to the prospect.
- Identifying the proper person or people that you need to contact and exactly who the decision-maker will be. You don't want to waste time presenting to someone that doesn't have the authority to make the decision to buy, unless that is a requirement of the customer's organization.
- Understand what other parameters might be involved in the decision making, such as budget issues, the timing of the organization's fiscal year, decisions that are pending with the organization's leaders, etc.
- Know your own product or service in every detail so that you can focus on the features, benefits, and advantages of your offering that will be important to your prospect.
- Prepare and practice your sales presentation, as well as any additional materials such as hand-outs, brochures, samples, graphics, etc. Prepare more copies than you believe you will actually need in case the prospect invites someone else to the meeting at the last minute.
- Prepare a list of questions or topics that you need to cover during the information-gathering portion of your meeting with the prospect. Be sure you know what it is that you want to leave the meeting with, and organize your presentation and questions so that you can achieve it.



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#### 4.4.2 Step Two – Introduction

Remember what we learned earlier – that you have just 5–15 seconds to make a first impression and capture the prospect's attention. That means that your introduction is vital for setting the tone for the rest of the meeting. You should consider the way you will introduce yourself, your organization, and your product, as well as how you will demonstrate that you have credibility as an expert in the topic you'll be discussing.

Here are some tips to help you design your introduction:

- Smile, and be confident. If you have prepared well, you should feel very confident in your ability to handle the meeting and whatever might come up. Have a professional, friendly demeanor and work to put the prospect at ease.
- Introduce yourself, your role, and your organization. Be sure to focus on information that will be relevant to the prospect's interest and their business. Introduce anyone else from your team, and be sure to allow the prospects to introduce themselves as well.
- State the purpose of the meeting, again focusing on what is important to the customer. For example, you could say something like, "I'm here today to learn more about your challenges and your priorities and then explain how my company can help you to meet your challenges and achieve your goals. This also helps you gain agreement on the fact that you will be asking a series of questions about their company and their needs.
- Be sure you know how much time your prospect has and respect it – finish at the agreed-upon time even if you haven't finished your presentation.
- Before taking notes, ask to make sure that your prospect is comfortable with you doing so. Some information they share might be sensitive, and asking permission shows that you realize this.

#### 4.4.3 Step Three – Questioning

If you have done your preparation work, you will have a list of questions or areas that you need to gather information about before you will be able to make a fully customized presentation to the customer. However, you will find that as you ask questions, you will probably expand upon that list. But besides the questions that you need to ask, you'll need to consider how and when to ask them. Following are some guidelines for the questioning part of your meeting:

- Establish a rapport with the customer before launching into your questions. You may actually be able to use some general or basic questions in order to start establishing rapport and demonstrating your understanding of the customer's situation.
- Listen, listen, listen. Express empathy for what the customer's challenges may be and use rephrasing to ensure understanding.
- Pay attention to body language – both your own and the customer's. Remember that body language and other non-verbal cues can tell you more about how the customer feels about what you are saying than the words they use.

- The main purpose of the question phase is to identify the major needs of the customer in relationship to the product or service that you are offering. What benefits are most important? What features are most needed? After you have established this, you can move to the secondary needs and desired benefits.
- Questioning should also help you to discover how you should move forward. What is the preferred process of the customer's organization when procuring products or services such as yours? How does the organization make decisions? What else or who else will be involved before a decision is made?
- Use a variety of open and closed questions, depending on the information you are trying to discover. Open questions are those that result in more than a yes or no answer. They allow the customer to tell you about a subject in their own words, and give you plenty of information to follow-up on. Closed questions are those that result in a yes or no answer. They are generally used for clarifying something that has been said, checking individual facts, or gaining agreement.
- After you ask a question, be quiet! Give the customer the chance to respond in their own time. Your customer should be doing the majority of the talking during this phase.
- Never interrupt.
- Reflect back and use paraphrasing to confirm that you have understood what the customer is saying. This shows you've been listening and that you 'get' their situation.
- Don't start problem-solving by turning to your offer too quickly. You don't want to jump on an issue before you have gathered all of the information you need because you could end up looking foolish.
- When you feel you have all the information you need, take a few moments to summarize what you believe are the main strategic issues or key needs and requirements. Get agreement from the customer that you have this information correct – otherwise any proposal you make will be flawed.
- Thank the customer for their time and information, and then agree upon what the next steps will be.

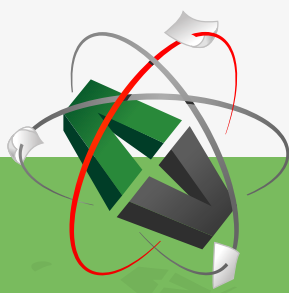
#### 4.4.4 Step Four – Presentation

Depending on the complexity of your product or service, the time you have with the client, and the level of work that preparing a presentation will take, you are likely to perform this portion of the sales process at a separate meeting or on a separate phone call than the questioning phase. This will give you the opportunity to give the customer the best possible presentation.

- Your presentation should focus on the central strategic need(s) that you identified in the questioning phase of the process.
- Demonstrate how your product or service can fulfill that need and forward the company's strategy. You should also show that you've taken into account the organization's constraints, concerns, priorities, and goals.

- You may need to recognize that, if you have to present to different sections of the organization, you may need to focus on different supporting needs and benefits, even though the main strategic benefit will remain the same.
- Remember to focus on the benefits of your product or service, not just the features. Features can lead you down a highly technical train of thought that the customer may not be interested in. But when you focus on benefits and show the customer how your product will help them to be successful, you will keep the attention of the customer.
- As you prepare your presentation, consider what the expectations of your listener are. Then be sure that you respond to and meet those expectations.
- Emphasize the quality of your product or service and the integrity of your organization – show that you are someone that the customer would be proud to list as a supplier.
- Your presentation should also include:
  - Clear, concise information that is delivered in a professional manner
  - Evidence of success for similar customers or from similar types of businesses. You're demonstrating you have been able to help others be successful and you can do the same for them.
  - The language of the people you are presenting to – the lingo, phrasing, or vocabulary that shows you to be an expert in their field.
  - Samples, demonstrations, or exhibits, where possible
  - Time for your customer to ask questions

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#### 4.4.5 Step Five – Overcoming Objections

Learning to overcome objections is an important skill in sales. Even if you don't have any out-right objections, you will certainly need to negotiate some terms of the sale or fine-tune some of the conditions of the proposal that you've given. The key to handling objections is to do so constructively, by looking at them as an opportunity to clarify, provide more information, or identify areas you haven't yet addressed with the customer. Here are some suggestions for handling objections in a constructive manner:

- Try to get to the root of the objection by using reflecting questions such as “what makes you say that?” or “what about that concerns you?” These or similar questions can help you identify what the true concern is. Remember The Five Whys – ask ‘why’ several times and that can help you identify the real issue as well.
- In many cases, an objection is really just a way of asking for more information. If you face an objection, avoid repeating information that you've already given. Instead, ask questions and probe the objection.
- Avoid using the word ‘but’ in response to an objection, which sounds confrontational. Never engage in arguments or discussions based on personal issues – even if you ‘win’, you'll have severely damaged your relationship with the customer.
- Keep track of the objections that you receive and answer. You can use the information to help you identify other ‘hidden’ objections, but it can also be a way to show your customer that you are working with them to move towards an agreement.
- Avoid the ‘early close’ even if you get the feeling that the customer might be moving towards an agreement. You want to be sure that you've handled all objections before moving to the close phase – otherwise they will show up later and the sale will fall through or you will end up with an unhappy customer.

#### 4.4.6 Step Six – Close

If you have conducted the previous steps well enough, a close step is just a formality. You'd have led the customer through any and all objections such that there is no need for you to make active attempts at a close. In the best scenario, your close will simply be a question such as ‘are you satisfied that we've covered all the details and would you like to move forward with this project?’ or something similar. If you've done a fantastic job, the customer may even move to the close himself.

But there will be times when you need to move to an actual closing phase. Whether or not you do will often depend on the personal preference of the decision-maker that you are working with. You should be aware of what kind of person your decision-maker is. Is she a high-achieving, direct type who wants you to close and move on? Then don't leave details hanging – go ahead and wrap things up right away. If you have a technical guru on your hands, they are more likely to want to cover every detail of the sale, the product, and the service. Don't rush them – take the time that is needed. Realize too that if you try to push someone who is a really friendly type of person, they might say yes before they are ready – which will end up backfiring. So pay attention to the signals that your decision-maker is giving you, and act accordingly.

Don't be afraid to ask for the close, but do so without any tricks or tools. Simply state something like, 'if I'm right, it sounds like we've covered all of the bases here and you've gotten the additional information you needed. So do you feel comfortable moving forward? Ask them directly, and listen to what they say. If you aren't getting the signals from your decision-maker that they are ready to commit and close immediately, find out exactly what steps you need to take next, and don't leave the meeting without a plan for when and how you will be in touch again.

#### 4.4.7 Step Seven – Follow-up

This phase encompasses anything that happens after the close. This could be fulfillment, delivery, installation, implementation, transfer of their current service to yours, training the customer on your product, or resolving any other issues that arise. It also includes:

- Completing any relevant paperwork and providing copies of all the important information to the customer (receipts, confirmation documents, order details, etc.).
- Completing the internal process required to fulfill the sale.
- Completing your internal paperwork or process to report your sale.
- Follow-up with the customer to confirm that they are happy with everything since your close. Make sure that expectations are met and promises are fulfilled. Resolve any problems or issues and take full responsibility for the customer's experience.

Remember that regardless of what happens, customers are likely to hold their salesperson responsible for their experience. Following up lets you demonstrate that you have the integrity to stand behind your product or service, and that the customer was right to choose your company. You can't underestimate the value of a satisfied customer – often they will provide additional sales from their own company or via referral, whereas a negative customer can prevent you from ever receiving those sales.



# 5 Maintaining Customer Relationships

## 5.1 Introduction

As we said earlier, it takes a great deal less effort to maintain a customer relationship than to find and secure new customers. As a result, it would behoove any salesperson to take the steps necessary to maintain in contact with his customers so that his efforts can be as focused and effective as possible. Luckily, in this age there are plenty of tools available to help you to maintain positive relationships with all of your customers.

## 5.2 Being Perceived as an Expert

If you have done a good job of selling to the customer, chances are that your customers now see you as a partner in their business. At the very least, they should see you as a source of expert information and assistance when they need it. You can reinforce this perception of you by taking some simple steps like:

- Sending customers information from industry publications or other sources that are related to their business.
- Keeping informed about any regulatory changes to their business.



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- Following your customers in the news so that you know what their challenges are and what they might need in the future.
- Creating a network of contacts so that if your customer needs something you don't provide, you have a specific person that you can refer them to.
- Continuing to receive training on developments of the products that your company offers, as well as any products that your competition is offering.
- Attending conferences that are related to your industry and sharing what you learn with your customers.

### 5.3 Keeping the Customer Informed

If you are established in your customer's eyes as an expert, getting in touch with them will be easier to do. You won't be perceived as the average salesperson trying to push the latest product. This means that you will have the opportunity to keep your customers informed of any changes to your company's products and services. You should keep customers informed of things like:

- New releases of a product they are using.
- Changes to a product or service they are using.
- Any problems that have been discovered with a product they are using (don't wait until they come to you!).
- Brand new products that you think the customer will be interested in.

### 5.4 Selling to Existing Customers

Once you've made that first sale, you will find that each individual future sale will be easier – the process will be faster, the close will be easier, and you'll find the entire process simpler if you are trusted and considered an expert by the customer.

To facilitate future sales to existing customers, you will need to keep detailed information on the customer. This will help you to target the right customers when your company is offering new products or running promotions. That way when you call, you have benefits to offer that you know will truly be of an advantage to your customer. Calling the customer with an offer that provides no benefit to them will quickly discredit you as their 'expert'.

Some of the things you should keep in your file include:

- Current contact information – capture any changes in personnel or titles, and ensure that you have the correct spelling and contact information for each person.
- Information on their current services – both provided by you and by any competition.
- A copy of the company's quarterly reports or other similar documents so that you can refresh yourself with relevant information before you contact the customer.
- Any notes you've made in previous conversations with the customer about any additional products or services.

- Any personal information you've learned about your contacts. Asking a customer how their son's football team finished the season or how their wife's charity venture is going are excellent ways to establish rapport and distinguish yourself from the competition.

You will hopefully have your customers on some kind of rotating contact schedule. There might be some customers that you want to contact once a month, once a quarter, twice a year, or just once a year – it depends on the customer and on your business with them. But there's nothing wrong with staying on the customer's radar. You can do this through personal contact, phone calls, emails, or by mail when you send out those articles you've been clipping or that information you've been collecting from trainings. Keep showing up in a positive, helpful way and you will certainly be the first person that your customer thinks to call the next time they need a product or service that you offer.

## 6 Resources

Businessballs.com. Sales and Selling – Training and Techniques.

<http://www.businessballs.com/salestraining.htm#changingfaceofselling>

Johnson, Emjae. List of Basic Skills that Every Successful Sales Person Should Have.

<http://sales.about.com/od/hiringsalespeople/tp/basicsalesskills.htm>

Mindtools.com. The 5 Whys. Quickly Getting to the Root of a Problem.

[http://www.mindtools.com/pages/article/newTMC\\_5W.htm](http://www.mindtools.com/pages/article/newTMC_5W.htm)

Mindtools.com. The Sales Funnel. Keeping Control of Your Sales Prospects.

[http://www.mindtools.com/pages/article/newLDR\\_94.htm](http://www.mindtools.com/pages/article/newLDR_94.htm)

Neyman, John, Jr. 5 Powerful Tips to Persuasion.

<http://www.submityourarticle.com/articles/John-Neyman%20Jr-482/speaking-2255.php>

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Taylor, Henry. 5 Simple Self Motivation Tips for People.

[http://www.articlealley.com/article\\_1640\\_15.html](http://www.articlealley.com/article_1640_15.html)

Warner, Charles. How to Present and Killer Presentations.

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